

WIS Advanced Features Part II

As we've seen in previous sessions, recent processes will contain the document types that you've previously built. In this session we've built all four of the given forms; notice of staking, application for permit to drill, well completion report and the Sundry notice. These forms will be generated on this list as you build them and again keep in mind that you can go to browse processes and open up the WIS folder and open up one more form if you need to start a form for the very first time. Again we can use the action item button to return back to the previous screen.

What I'd like to is a little bit more on this particular form point out a couple of features that are also available for form categorization or organization. One thing you'll notice over here is we have a section called label, manage labels and labels. What we can do with the label feature is basically further organize our transactions in a given label or another file drawer if you will. A label can be assigned to any document or unassigned to any document but a document can only have one label at a time. For example if I was working on a number of different projects that were all in a particular area; what I could do is I could manage a label. I could create a label by clicking on the management label tab and let's say for example I want to label a number of my documents as south ark farm lease. I would create a label by saying south park farm lease, click on create and it's given me a label available for south park farm lease. Let's say I want to create another label called north glen fee lease. Type that in and create that label; so now I have two labels that I can apply to different transactions. I

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can rename or delete in those particular files. Once I've got my files built I can return to action items and it's usually easiest to do this in processes. If I want to apply a label to my first document, I click that little check box, select it off the list and say apply that label. If I want to apply a label to a different document, check the check box, select the label and apply the label. Now kind of probably would lead you to ask a question and say, "Well now that I've got these things labeled; what good are they?" If you want to quickly search for a form with a particular label; all you do is click on that label name and it will bring up that form or those forms that have that label. Click on a different label name; it'll bring up those forms as well. We can remove a label or change a label, but keep in mind that a transaction can only have one label at a time. If you're concerned about where you're at you can always click back on all and show all your documents.

What I'd like to do next is go over the columns rather quickly; go over what you're seeing from left to right as you build processes. All processes will be itemed, number 1 through however many as you build them. You'll be able to see 10 documents at a time paging across so this is just simply an item number. When you want to do an action on a particular document whether it's manage the labels or archive you'll come in here and put a check box in these documents. You can file a label or archive multiple documents by just clicking on them. The process name shows up next and these are basically the four form process names; notice of staking, application for permit to drill, well completion notice; Sundry notice. This gives you a little opportunity to be able to classify those. Under this column

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shown as an I; there are two types of features that you'll see here. You'll see a plain italicized I and that means more information exists or you see an I with a red C behind it and those are information tabs with comments. As you point your cursor you'll be able to see that label get activated. One of the things we'll go ahead and look at later is a document that actually has comments and information in it. A is for attachment and if you have the attachment icon in dark; you'll see that there are attachments. If you have a greyed out paperclip; that means there are no attachments for that particular document. The status column basically shows whether or not your document is in process which this little circular icon would be or if it's been suspended or you'll also have an icon in here at some point where you'll have an F for finalized. Steps we've gone over recently in previous sessions. Step 0 of 7 indicates that the form has not been sent, 0 of 7 indicates that it has not been sent, 1 of 7 indicates that it has been sent to the BLM, 2 of 7 it's been received by the BLM, 7 of 7 it's been approved or other wise given a final disposition and in a moment we'll talk a little bit more about steps 3, 4, 5, and 6 of 7. The current editor is basically the person who owns that form right now; 0 of 7 would be yourself as the editor and then once it's sent it changes to BLM automated submissions and it's actually owned by the admin. The modify date is the date that it was last modified. Usually this is going to be the date that you sent the document or when the document was returned to you as finalized and then we have the identifier number which is basically the system identification number and you'll notice there is a bit of a pattern to how

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these numbers are generated and they're basically a sequential number that is form specific.

One thing I'd like to show you before we go into the next level of form features is a way to archive documents that you've not sent. These might be documents that you've practiced on and you no longer really need to have them in this area.

When we were archiving documents that were in this particular screen we could archive documents that are anywhere from 1 of 7 to 2 of 7 and onward but 0 of 7.

In order to archive documents that are at 0 of 7 the process is just slightly different. What we need to do is come to action items, select our document by opening it up, going to the bottom of the form and under the route button pull down we can click on suspend, click okay and because the system wants to operate in your best benefit it'll ask you why you would like to archive or suspend this document. You can basically say that it was a duplicate for practice or anything yeah that you'd like to type in there. All it takes is just at least one character and you can click on submit and you'll see a confirmation screen that it was successfully suspended. We can go to my processes, select the items that have been suspended, click on archive and they're now gone. Well they're not really gone; they've just been moved to a different file folder. We have them over in archived and you'll notice that in archive we have suspended and finalized documents. If we'd like to move them back and it's okay if you change your mind. If you'd like to move them back you basically click the check box, click on restore and they've now been moved back.

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Now that I've covered the majority of the top level features in this opening screen, I'd like to move on to a little greater detail and look at some of the form features that are available in a specific form.